

Total Integrated Procurement System

Laboratory Interface Committee

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■ Mission

- To establish requirements for a vastly improved Laboratory interface to the Procurement System

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Laboratory Interface Committee

■ History

- Legacy Systems, such as PAID are 70s, 80s technology
- Client Server, with GUI interfaces is technology of the 90s
- The LLC strongly supports the need for state of the art “Gee Whiz”, “Best in Class” Business and Administrative Systems
- We need to partner with you, our customers, in understanding and designing business systems for today and tomorrow

Total Integrated Procurement System

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■ Conceptual Vision

- To establish requirements for an automated procurement system interface which would provide procurement information and tools commonly required by Laboratory personnel for the requisitioning, placement, user management, and administration of their procurement activities

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■ Customer Feedback

- What aspects do you like of the conceptual outline?
- What aspects do you not like?
- What additional items need to be included?
- What can be eliminated?
- Other comments

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■ Conceptual Outline

- The Committee envisions an automated procurement interface with the following attributes:
 - » On-line window type multi-platform Procurement System that would have the potential to access the internet to browse vendor catalogs or technical data
 - » A permanent on-line Requester Profile reflective of constant data such as: Z-number, group, mail-stop, telephone, fax, funding codes, delivery point, ...etc with the ability to override certain elements as needed
 - » A system of an “expert” smart type, similar to TurboTax, which will guide the individual through the process with a series of questions

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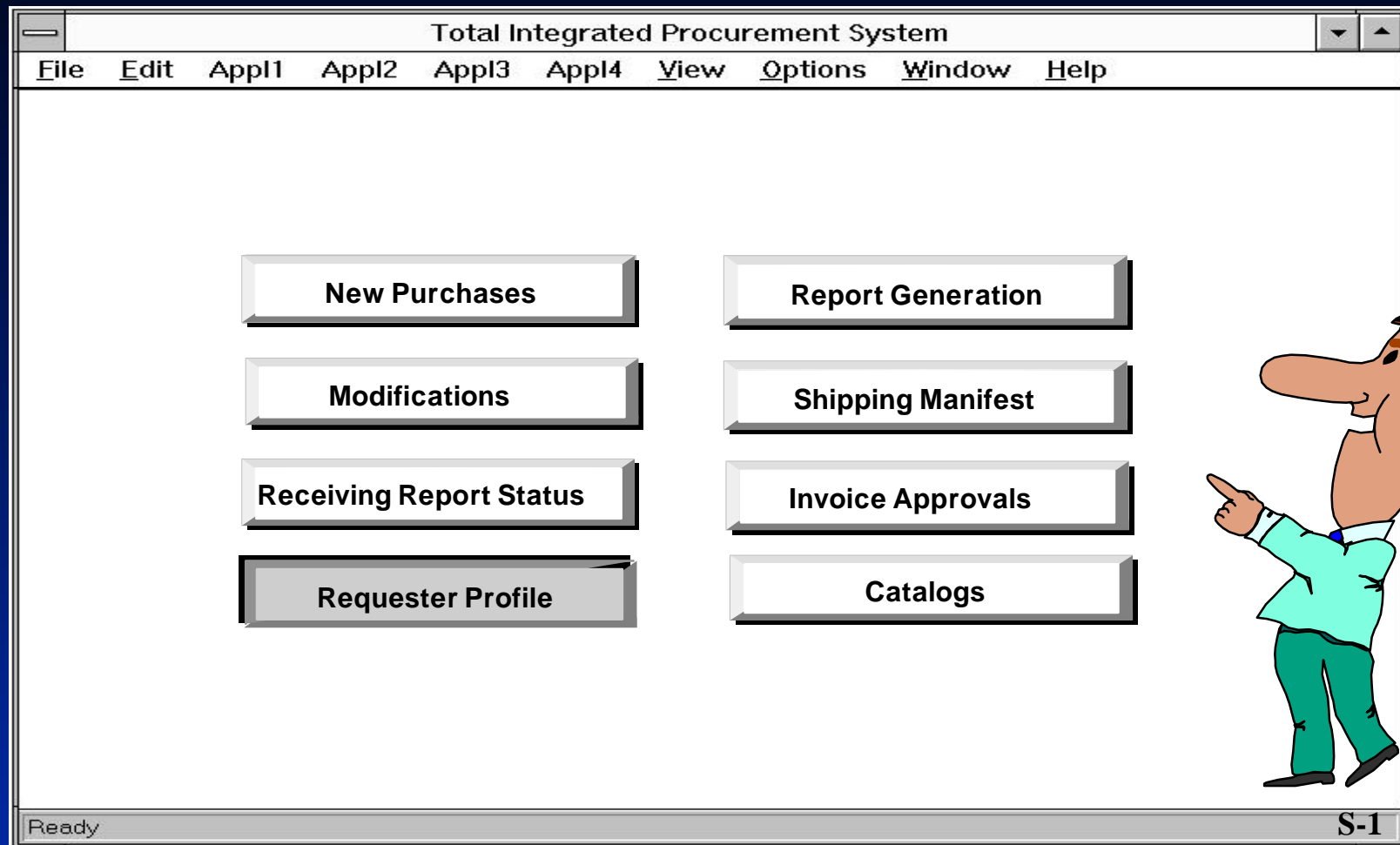
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■ Menu Drop Down

- The user will be able to distinguish the type of transaction desired by pointing and clicking on graphical interfaces using action buttons, icons, and drop down selections

Total Integrated Procurement System

Main Menu



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Requester Profile Menu

Requester Profile

File Edit Appl1 Appl2 Appl3 Appl4 View Options Window

Requester Profile:

Requester Name _____ Z# _____ Date _____

E-Mail Address _____ Phone _____ M/S _____

FAX# _____ Pager# _____

Group _____ Division _____ Team/Project _____

Signature Authority \$ _____ Other Authority

Primary Location for Deliveries

Tech Area _____ Bldg _____ Room _____ DDP _____

Alternatives

Ready S-2

Total Integrated Procurement System

Requester Profile Menu

Requester Profile

File Edit Appl1 Appl2 Appl3 Appl4 View Options Window Help

Requester Profile: Name: _____

Cost Distribution

Primary Cost Ctr _____ Prog Code _____ FIN Acct _____ Work Pkg _____

Alternatives _____

Notifications Sent via ☐ E-Mail ☐ FAX ☐ Hard Copy

☐ Buyer Assigned ☐ Proposal Received

☐ RFQ/RFP Published ☐ PO/Contract Awarded/Placed

☐ Material Received ☐ Invoice Posted (costed)

☐ PO/Contract Closed ☐ Modifications Changes

Direct Notices To:

☐ Primary Address _____

☐ Alternate Address _____

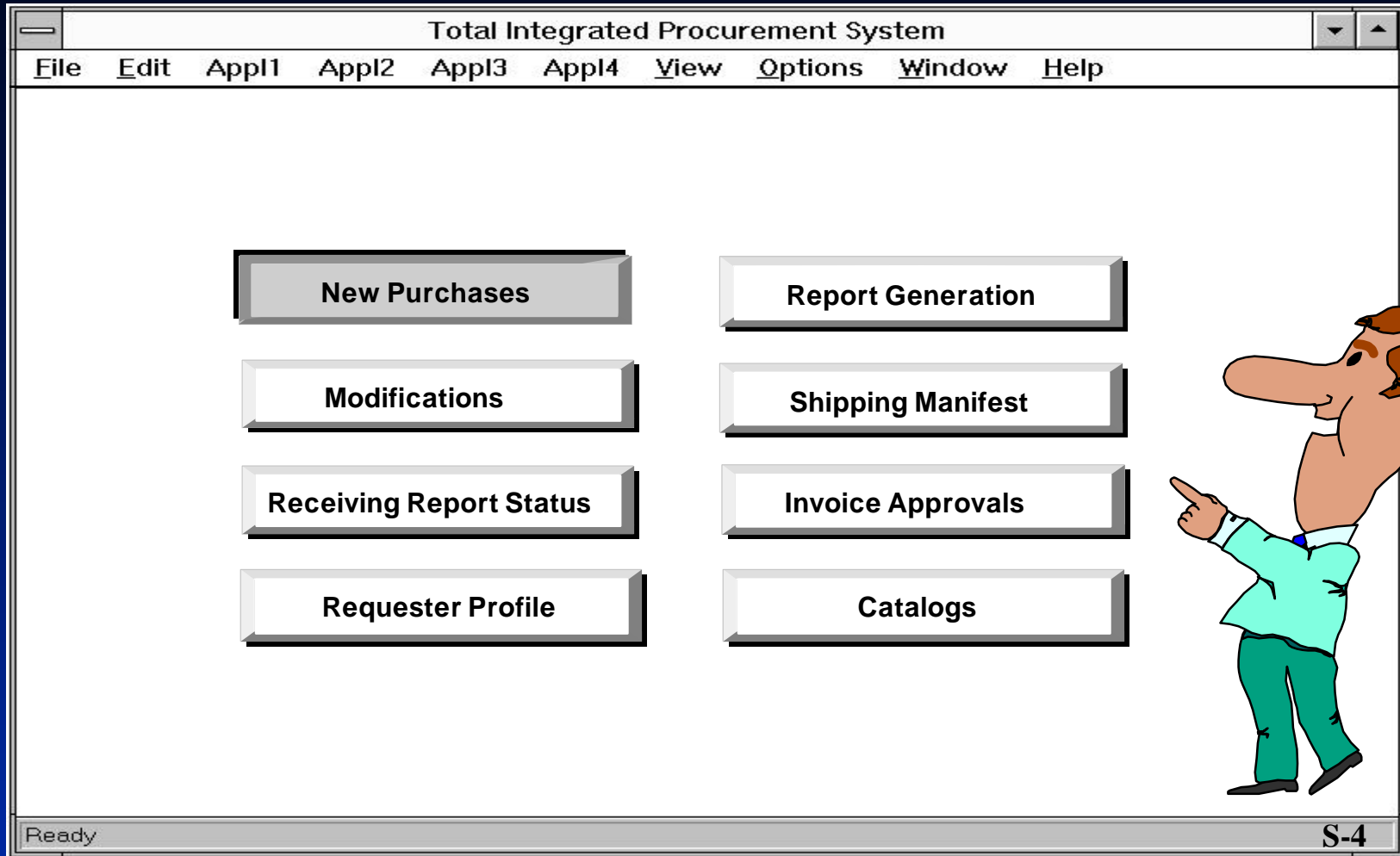
☐ Other _____

Menu Back Review Exit

Ready S-3

Total Integrated Procurement System

Main Menu



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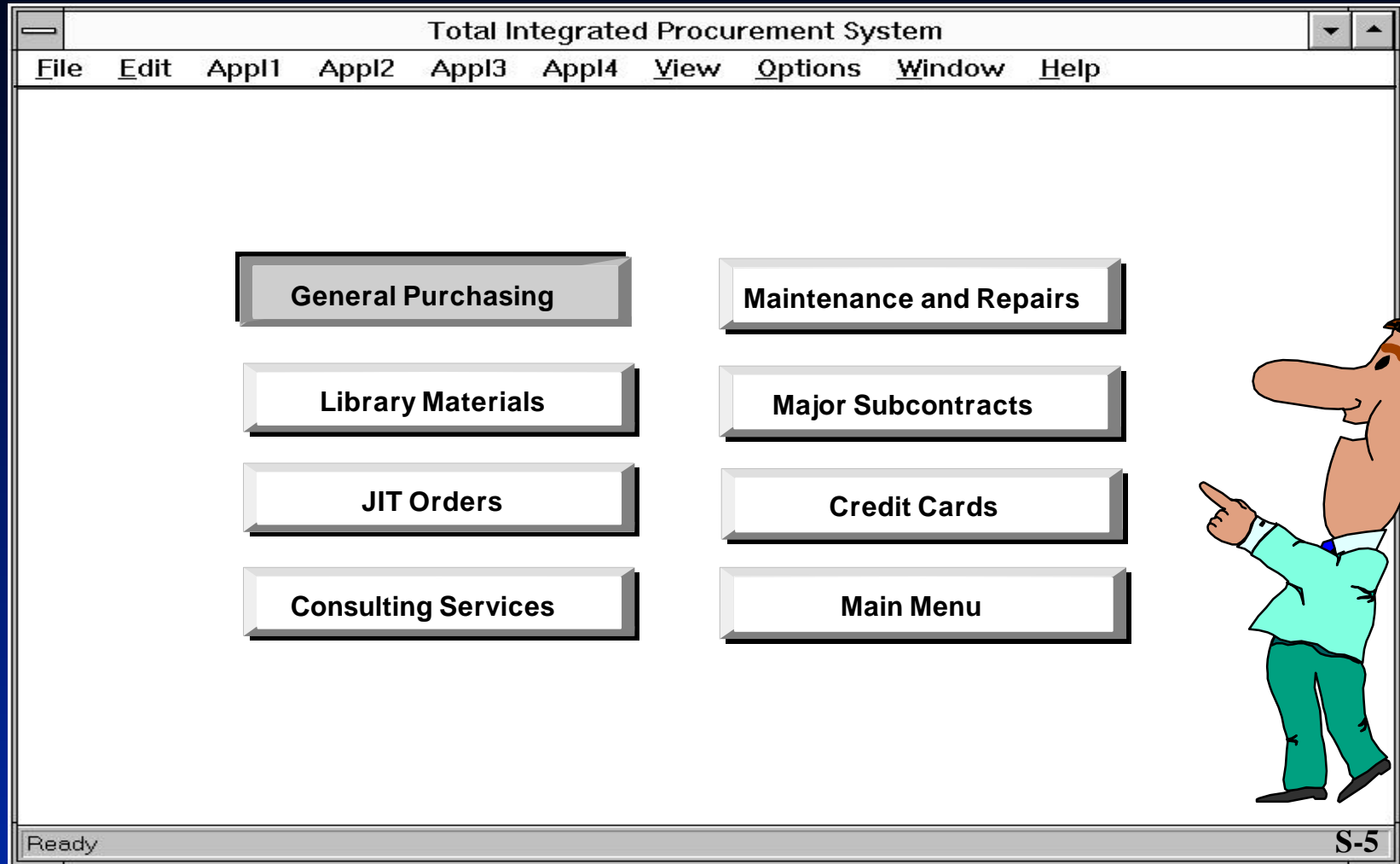
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■ Secondary Menu

- A secondary menu could be used to concentrate the ordering effort to a particular category or type of procurement.

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Secondary Menu



Total Integrated Procurement System

General Purchasing Menu

General Purchasing

File Edit Appl1 Appl2 Appl3 Appl4 View Options Window

Select one: ☐ Material, Equipment, Supplies
☐ Services (no repair or maintenance)

Item #1

Description

Est Cost

Dollar Requirement

Cost Distribution Code

Suggest Source(s)

General Nomenclature

\$

Bldg Site DDP

Notify

Cost Ctr Prog Code FIN Acct Work Pkg

3


Review Exit Help

Ready S-6

Total Integrated Procurement System Description

General Purchasing

File Edit Appl1 Appl2 Appl3 Appl4 View Options Window

Description: 

General Nomenclature _____

Model _____

Part Number _____


Technical Details _____

☐ Statement of Work

☐ Sole Source

☐ Justification of Need

☐ Other Documents


Special Handling: 

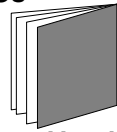
Delivery: ☐ Default

☐ Detail: Bldg _____ Site _____ DDP _____

Notifications: ☐ Default

☐ Detail: Address _____ @Lanl.gov

 Previous POs

 Vendor Catalog

Ready S-7

Total Integrated Procurement System

General Purchasing Menu

General Purchasing

File Edit Appl1 Appl2 Appl3 Appl4 View Options Window

Select one: ☐ Material, Equipment, Supplies
☐ Services (no repair or maintenance)

Item #1

Description

Est Cost

Dollar Requirement

Cost Distribution Code

Suggest Source(s)

General Nomenclature

\$

Bldg Site DDP

Notify

Cost Ctr 3

Prog Code Review

FIN Acct Exit

Work Pkg Help

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Total Integrated Procurement System

Estimated Costs

General Purchasing

File Edit Appl1 Appl2 Appl3 Appl4 View Options Window

Estimated Costs: OK
Cancel

Item #1 ↑↓ _____
General Nomenclature

Costs: Quantity _____ Unit of Measure ↑↓

Est Unit Costs _____ Extended \$ _____

Not to Exceed \$ _____

Cost Distribution: ☐ Default
☐ Detail

Cost Ctr _____ Prog Code _____ Cost Acct _____ Work Pkg _____ FIN Acct

Next Back Review Help

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Total Integrated Procurement System

General Purchasing Menu

General Purchasing

File Edit Appl1 Appl2 Appl3 Appl4 View Options Window

Select one: ☐ Material, Equipment, Supplies
☐ Services (no repair or maintenance)

Item #1

General Nomenclature
\$

Bldg Site DDP

Notify

Cost Ctr 3 Prog Code FIN Acct Work Pkg

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Total Integrated Procurement System

Procurement Summary

General Purchasing

File Edit Appl1 Appl2 Appl3 Appl4 View Options Window

Procurement Summary

☐ Current PR

☐ POs and PRs ☐ POs only ☐ PRs only

☐ Assigned to me

☐ Assigned by others Name _____

☐ By Cost Center _____ and/or Prog Code _____

☐ By Date Start _____ and/or End _____

OK
Cancel

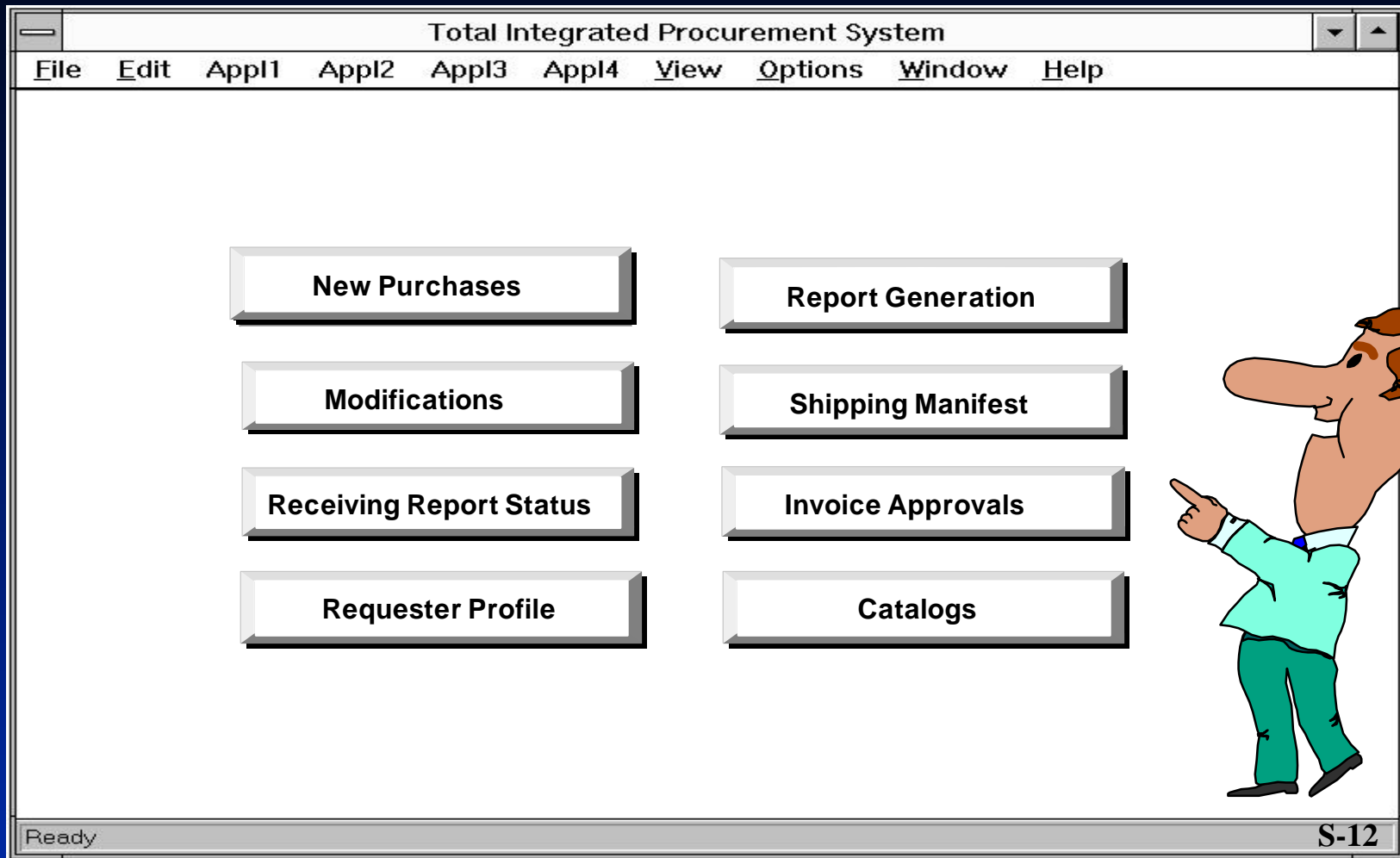
Date	PO#	Vendor	Description	Cost Ctr	Prog Code	Due Date	Dollars	Closed
								↑↓

Menu Details Help Exit

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Total Integrated Procurement System

Main Menu



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■ General Purchasing

- Within each module the system will be “expert” and ask a series of pertinent questions related to the PR. The system may ask the following questions:
 - What is the requirement
 - Model or part number, or does the requirement warrant a statement of work (SOW) and specification?
 - If so, and the SOW is already written, the system will ask what format the SOW is written in and add it as an attachment to the PR

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■ General Purchasing (cont)

- or; the system would then switch to a different module and give examples of and help prepare the statement of work and specification
- What is the realistic required delivery date?
- What are the funding codes?
 - The system will verify that the codes are accurate and funding is available
- Do you want premium shipping?
- Do you have special handling requirements - Quality Assurance, hazardous materials, radioactive, perishables, etc

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■ General Purchasing (cont)

- Do you have any special requirements - OCI, FOICI, R&D Checklists, etc
- Do you want to be notified when the material is received and ready for pick up?

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■ Feedback

- The system will produce a summary of the PR, the data entered, and any attachments. If changes are necessary, this would be the proper place to make the changes.

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■ Distribution

- The system will be capable of electronic routing. The intent is the PR can be tracked by the requester through the different tiers of approvals and when the PR reaches the buyer's computer, it is ready for solicitation or award. When the PR leaves one address an electronic message is sent back to the requester advising him of the action. The following is a possible route
 - Group Leader
 - Financial analyst
 - Property administrator
 - FSS
 - Other individuals that may be required
 - Buyer

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■ Final Report

- After the Purchase Order has been awarded the system will send an electronic message to the requester reporting the following information
 - Buyer's name, telephone, fax, mail stop, e-mail address
 - Full Purchase Order number
 - Date the award was made
 - Anticipated ship date
 - Anticipated receiving date
 - Anticipated delivery date
 - Actual delivery date

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■ Final Report (cont)

- Name of the vendor and telephone
- The actual cost
- Funding codes w/split codes if used
- Anticipated date of invoice payment
- Anticipated Purchase Order close out
- If changes to the PO occur; delays in shipping, increases in cost, or a new buyer gets assigned, the system will be updated and all affected pieces updated as well

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■ Electronic questionnaires

- After the PO close out the system will send simple electronic questionnaires
 - Vendor questionnaire:
 - Was the material received, the material ordered?
 - Was the material late?
 - Were you satisfied with their service, product, etc?
 - Buyer questionnaire:

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- Electronic Invoice and Approval
 - An electronic message from Accounts Payable would prompt the requester with an approval copy of the invoice; upon approval the system forward the copy to Accounts Payable and the buyer

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- Ad hoc Queries and Reports
 - Provide fixed and modified reporting capabilities permitting downloads of information to databases or spreadsheets

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File Edit Appl1 Appl2 Appl3 Appl4 View Options Window Help

PO Order Costing

PO# _____

Order Amt _____

Gross Recpt Tax _____

Freight Costs _____

Proc Recharge _____

Group Support _____

Division Support _____

G&A _____

Total _____

PO Costing Information:

FIN Acct	Cost Ctr	Prog Code	Cost Acct	Work Pkg

A/P Voucher # _____

RCVR #	Line Item	Quantity	Dollar Amt	Entered By

Click on this field for contact information

Back Next Help

Ready